



Presented by  
Management Forum

# Managing Information Flows in IP Transactions: Trade Secrets

3 October 2024

+ 13 February 2025, 6 June 2025, 15 October 2025

An in-depth look at how to protect your confidential information and trade secrets during IP transactions.



**Format:**  
Live online



**CPD:**  
6 hours for your records



Certificate of  
completion

# Course overview

**This practical one-day course will enhance your knowledge of the principles and practice of information management in IP transactions, with a special focus on trade secrets.**

Safeguarding trade secrets is essential for maintaining a company's competitive edge, ensuring financial stability, fostering innovation and maintaining legal protection. They also play a crucial role in strategic positioning, maintaining customer trust, operational efficiency, and employee loyalty. Companies that prioritise the protection of their trade secrets will be better positioned to sustain long-term success in a competitive market.

This course looks at the criteria and principles of managing confidential information, know-how and trade secrets as part of an IP strategy. Trade secrets are a special type of confidential information that need to be managed carefully inside and outside the organisation to ensure your business gets the best commercial benefits from them.

Trade secrets may be commercial or technical in nature and should be treated with the utmost confidentiality to maintain their integrity. A trade secret is an intellectual asset and as such forms a very important part of any IP portfolio. Trade secrets are important to all businesses and may be particularly important for SMEs, start-ups, and early-stage companies.

The course is presented by the expert trainer in three main subject areas:

- Theory and background
- Management of information to secure trade secrets
- Trade secrets in inter-company negotiations

The course includes practical exercises to help embed the learning. There will also be plenty of time for you to ask the expert trainer your questions.

## Benefits of attending

By attending this event you will:

- **Gain** a better understanding of the types of confidential information
- **Get to grips** with the role of trade secrets in an IP portfolio
- **Learn** to manage access to information in your organisation
- **Understand** the basics of the Trade Secrets Directives
- **Consider** how to use trade secrets for commercial purposes

## Who should attend?

This course has been specially designed for all those working in the life-sciences sector, in technical industries, and other commercial innovation enterprises. It will be of particular use to:

- IP managers
- Patent research specialists
- R&D managers
- IP legal professionals
- Patent and trade mark attorneys
- Technology transfer specialists
- CTOs
- Information managers

# Programme

## **Theory and background**

- Background and an overview of:
  - Current trade secrets laws
  - Directives and treaties in Europe and the USA
  - How the legislation impacts business practices
- Trade secrets, know-how and patents as part of the IP portfolio
- The importance of timing
- When to disclose information

## **Practical exercise: How to recognise a trade secret**

### **Management of information to secure trade secrets**

- Trade secrets are only of value if they remain a secret
- Points to consider to guard trade secrets in-house:
  - Who should have access to trade secrets?
  - How to record trade secrets
  - Review of tools available to manage trade secrets
- Recording, assessing and managing trade secrets as part of an innovation harvesting process in-house

## **Practical exercise: How to manage confidential information**

### **Trade secrets in inter-company negotiations**

- How to provide access to confidential information to third parties
- The importance of managing contractual agreements for international business discussions
- Should trade secrets ever be disclosed?

## **Practical exercise: How to manage access to confidential information**

# Presenter



## Jane List

**Jane List** founded Extract Information Limited, Cambridgeshire, UK, in 2013. Extract Information provides legal and industry focussed patent searching and reporting, IP management support for small companies, and product development consultancy for the information industry. Jane previously worked in IP and information analyst roles at The Technology Partnership (TTP) plc, Xaar plc and the European Molecular Biology Laboratory. She also worked in the information industry where she held commercial, content, and product development roles at Lighthouse IP, ProQuest, and DataStar. Throughout her career she has provided training in the management, retrieval and analysis of scientific, technical, medical, commercial and patent information, most recently through CIIPM where she developed the course in IP and Commercialisation.

Jane has qualifications in Chemistry, Information Science, and IP Law, and was for ten years, until December 2023, Editor in Chief of World Patent Information (WPI)Journal. She remains on the Advisory Board of WPI, and she is also on the Board of CEPIUG.

# Course dates

**3 October 2024**

**Live online**

09:30-17:30 **UK (London)** (UTC+01)

Course code 15285

GBP ~~499 599~~

EUR ~~719 859~~

USD ~~823 979~~

**Until 29 Aug**

**13 February 2025**

**Live online**

09:30-17:30 **UK (London)** (UTC+00)

Course code 15286

GBP ~~499 599~~

EUR ~~719 859~~

USD ~~823 979~~

**Until 09 Jan**

**6 June 2025**

**Live online**

09:30-17:30 **UK (London)** (UTC+01)

Course code 15287

GBP ~~499 599~~

EUR ~~719 859~~

USD ~~823 979~~

**Until 02 May**

**15 October 2025**

**Live online**

09:30-17:30 **UK (London)** (UTC+01)

Course code 15289

GBP ~~499 599~~

EUR ~~719 859~~

USD ~~823 979~~

**Until 10 Sep**

## How to book



**Online:**

[ipi.academy/2452](https://ipi.academy/2452)

Alternatively contact us to book, or if you have any queries:



**Email:**

[info@ipi.academy](mailto:info@ipi.academy)



**Phone:**

[+44 \(0\)20 7749 4749](tel:+442077494749)

## Discounts

- Booking more than one delegate on any one date qualifies for a **15% discount** on the second and subsequent places.
- Most events qualify for an **early booking discount** prior to 6 weeks before the course date. Be sure to check on our website, where the latest discounts will be shown.

## Further information

### Fee

The fee includes all meals and refreshments for the duration of the course (for venue-based courses) and a complete set of course materials (provided electronically). If you have any particular requirements, please advise customer services when booking.

### Please note

IPI Academy (and our training partners) reserve the right to change the content and timing of the programme, the speakers, the date and venue due to reasons beyond their control. In the unlikely event that the course is cancelled, we will refund the registration fee and disclaim any further liability.

### Terms and conditions

The rest of our terms, the event cancellation policy and the terms and conditions are on our website, please visit [ipi.academy/content/terms-and-conditions](https://ipi.academy/content/terms-and-conditions)

## Run this programme in-house for your whole team

Coming to IPI Academy for your in-house training provides an all-inclusive service which gives you access to a wide variety of content, learning platforms and delivery mechanisms as well as your own personal training adviser who will work with you from the initial enquiry through to feedback and follow-up after the programme.

With over 600 trainers, all practitioners and experts across a huge range of fields, we can provide the training you need, where you need it, when you need it, and at a price which suits your budget. Our approach to tailored learning and development consists of designing and delivering the appropriate solution for each client.

For your FREE consultation and to find out more about how we can work with you to solve your training needs, please contact our training advisers:



**ALEKSANDRA BEER**

**Tel:** +44 (0)20 7749 4749

**Email:** [inhouse@ipi.academy](mailto:inhouse@ipi.academy)



**YESIM NURKO**

**Tel:** +44 (0)20 7749 4749

**Email:** [inhouse@ipi.academy](mailto:inhouse@ipi.academy)



**IPI**  
Academy

IPI Academy is a training initiative of Falconbury and Management Forum; leading providers of industry training for over 30 years, based in the UK.

10-12 Rivington Street  
London EC2A 3DU

[ipi.academy](http://ipi.academy)

**Tel:** +44 (0)20 7749 4749

**Email:** [info@ipi.academy](mailto:info@ipi.academy)